



Table of Fees for Services

Carefully read Item 4 and Item 5 of [Form ADV Part 2A](#) (“Brochure”), as these sections of the Brochure contain important details about PlanDynamic LLC’s comprehensive financial planning and investment management services and fees.

We provide a choice of 3 ongoing, personal fiduciary services:

- **PlanDynamic Program** - CFP® financial planning **and** investment management.
- **PlanDynamic Advisory** - CFP® financial planning for self-directed investors.
- **PlanDynamic Portfolios** - Investment management.

In some instances, fees may be negotiable. The fees below will only apply to you when you request and enroll in the services listed.

Fees Charged by Investment Advisor	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management Fee	PlanDynamic Program 0.75% first \$1,000,000 0.50% next \$1,000,000 PlanDynamic Advisory - N/A PlanDynamic Portfolios 0.95% first \$1,000,000 0.75% next \$1,000,000	Monthly in arrears	Financial planning services Portfolio management for individuals and/or small businesses
Hourly Fee	Dynamic Starter Plan \$250 per hour / negotiable flat fee	Upon signed agreement	Financial planning services
Subscription Fee	\$0	N/A	N/A
Fixed Fee	PlanDynamic Program - \$100 - \$150 PlanDynamic Advisory - \$200 - \$300, plus one-time \$1,000 onboarding fee PlanDynamic Portfolios - N/A	Monthly in advance	Financial planning services
Commissions to the Advisor	\$0	N/A	N/A
Performance-based Fee	\$0	N/A	N/A
Other	\$0	N/A	N/A
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager	\$0	N/A	N/A
Robo-Advisor Fee	\$0	N/A	N/A
Fees may not apply to all clients; talk with your fee-only Certified Financial Planner™ about fees and costs applicable to you.			

Additional fees and costs to discuss with your fee-only Certified Financial Planner™

Additional Fees/Costs	Yes/No	Paid To
Brokerage Fees	Yes	If applicable, TD Ameritrade Institutional/Charles Schwab
Commissions	No	N/A
Custodian Fees	Yes	If applicable, TD Ameritrade Institutional/Charles Schwab
Mark-ups	No	N/A
Mutual Funds / ETF Fees and Expenses	Yes	Fund & ETF Providers (i.e. Vanguard, BlackRock, State Street)

Effective January 1, 2023. PlanDynamic, LLC is a registered investment advisor and fee-only fiduciary.